ProcureAZ Terminology & Concepts

This guide provides you with an overview of the terminology and concepts used within ProcureAZ. More information regarding ProcureAZ terminology and concepts can be found in the **Detailed Definitions** document.

Terminology

ProcureAZ uses different terminology than you may be used to. The table displays some common terms and what they are named within ProcureAZ.

Term	ProcureAZ Term
Solicitation (all types)	Bid
Responses (all types), including Proposals, Bids, Offers, etc	Quote
Term Contract	Blanket Purchase Order
On-Contract Purchase	Release
Off-Contract or One-time Purchase	Open Market
Delegated non-Contract Purchase, Direct Pay	Direct Open Market
After-the-fact or Unauthorized Purchase	Request for Payment Authorization (RPA)
Request for Purchase	Requisition

Organizational Structure

Every user and document within ProcureAZ must be associated with particular business units. For users, these associations control which business units they can conduct procurement activity on behalf of and what documents and addresses they can access. For documents, these associations can be used to route approval paths and drive reporting data. The table explains how business units are organized within ProcureAZ.

ProcureAZ Business Units	State of Arizona Business Units		
Agency	The State		
Organizations	State Procurement Office	State Agencies	Political Subdivisions
Departments	ADOA Divisions, Institutions, Programs and Units	Divisions, Institutions, Programs and Units within each Agency	Departments, Schools, etc.
Locations	Offices, Branches and Sections within each Division, Institution, Program and Unit	Offices, Branches and Sections within each Division, Institution, Program and Unit	Offices, Branches and Sections within each Department, School, etc.

ProcureAZ Terminology & Concepts

Roles

Every user with login access to ProcureAZ must have at least one role. Roles determine the purchasing and administrative functions a user is able to access. The table displays the different roles available within ProcureAZ, their functions and the personnel that generally hold them.

ProcureAZ Role	Primary Functions	Personnel
Basic Purchasing (BP)	• Process requisitions • Conduct solicitations • Manage contracts • Cut purchase orders	• Procurement
Department Access (DA)	**Optional** • Create requisitions • Approve documents • Receive items • Manage informal solicitations • Cut limited dollar purchase orders	• End-users (Customers) • Approvers • Business Managers
Inquiry	• Review procurement and system data • No ability to create or modify documents	• Auditors • Management
Organization Administrator	• Manage agency users • Manage approvals • Manage agency business units and addresses • Manage procurement documents and workflow	• Procurement Management
Internal Administrator	• Manage system settings • Manage vendor settings • Manage organization access	• SPO • GAO
Seller	• Respond to solicitation opportunities • Acknowledge received purchase orders	• Vendors
Seller Administrator	• Manage vendor users (Sellers)	• Vendors

Documents

The documents within ProcureAZ are used to conduct procurement activity. Users must create and submit documents in order to request items, conduct solicitations, establish contracts and order and receive items. The table displays the various documents that can be created and describes who can create them and what functions they support. Note that no administrative roles have the ability to create documents. In order to conduct purchasing activity, a user must have either the Department Access or Basic Purchasing role.

ProcureAZ Terminology & Concepts

Document Type	Purpose	Created By
Requisition	• Request on- or off-contract goods and services • Access the **Informal Quote** document (optional)	• Department Access • Basic Purchasing
Informal Quote	• Conduct an informal solicitation • Recommend a vendor for award	• Department Access (optional) • Basic Purchasing
Bid	• Conduct formal and informal solicitations • Create and publish solicitation amendments • Close response period • Access the **Bid Tabulation (Bid Tab)** document	• Basic Purchasing
Bid Tab	• View and evaluate solicitation responses • Request clarifications and revisions to responses • Recommend vendors for award • Convert awards to purchase orders and contracts	• Basic Purchasing (automatically created by closing response period)
Quote	• Respond to a solicitation	• Seller
Purchase Order (PO)	• Send orders to vendors • Setup and manage term contracts	• Basic Purchasing
Change Order	• Manage change orders and contract amendments • Access via Purchase Order	• Department Access (optional – change orders only) • Basic Purchasing
Receipt	• Record receipt, return and cancellation of ordered goods/services • Access via Purchase Order	• Department Access (optional) • Basic Purchasing

Document Statuses

As documents are processed to conduct procurement activity, their status changes in order to allow/disallow various functions associated with the document. Depending on the status of a document, it may become accessible and/or editable to only specific users. When documents require the action of a specific user, an email is automatically sent to that user to alert them. The table lists the most common statuses for ProcureAZ documents and describes what each means, what actions are permissible at that status and which users can perform those actions.

Status Name	Meaning	Available Actions	Actions Permitted By
In Progress	The initial status of new documents. The document is still being completed by the creator.	• Edit • Submit for Approval • Clone (creates a new copy of the document) • Cancel	• Creator • Authorized users
Ready for Approval	The document has been submitted for approval and is travelling down an approval path.	• Approval/Disapproval • Edit (accounting and commodity code information only) • Clone • Cancel	• Current approver
Returned	The document was disapproved by an approver.	• Reopen (returns document to "In Progress" status) • Clone • Cancel	• Creator • Authorized users
Ready to Send	The document has been approved and is ready to be sent to a vendor or vendors.	• Send to vendor • Clone • Cancel	• Creator • Authorized users
Sent	The document has been sent to a vendor or vendors.	• Clone • Cancel	• Creator • Authorized users
Cancelled	The document has been cancelled by the creator or an authorized user for the document's business units.	• Clone	• Creator • Authorized users